Metastorm e-Work™ Product Overview: Release 5.4

Metastorm e-Work is a Business Process Management (BPM) technology that delivers efficiency through flexible, automated processes. By building automated processes that create repeatable and enforceable best practices, it empowers staff to do more in less time, and with fewer resources because it eliminates the impediments of administrative, paper-based activities.

As a platform-based technology, e-Work enables organizations to design ideal processes, rapidly develop process-specific applications, and then modify them. User participation in process design and maintenance ensures that processes stay aligned with ever-changing business needs because solutions adjust promptly and continuously.

Process participation occurs via a Web browser, Microsoft Outlook, Novell GroupWise or Microsoft Digital Dashboard. Setting a process in motion starts with completion of a form in the client application, by clicking a URL and completing a form, or automatically by another system. Requests are placed on a user's To Do list if they are responsible for taking an action that moves the request to the next stage in the process. Requests are placed on a user's Watch list if they wish to track the progress of the request.

Metastorm e-Work Key Components

Manager's Edition

Non-technical managers use the Manager's Edition to map out their ideal processes that include the stages that folders pass through, and the defined actions that cause folders to move from stage to stage. They also can design forms, and specify where data comes from and the roles of participants. In essence, they determine the business rules that dictate how the process takes place.

e-Work Designer

Using the file generated in the Manager's Edition, the e-Work Designer enables IT staff to take the next steps toward process implementation – form creation or importation, and integration with other databases and applications.

The Designer provides tools such as a floating but "dockable" Property Editor, and the Integration Wizard. The Property Editor allows the in-context editing of properties by displaying them and their prompts with lists of valid settings that are dynamically updated as the design proceeds. Also expediting process development is the Metastorm e-Work Integration Wizard, which provides integration to external systems such as Microsoft Word, e-mail and ODBC-compliant databases without requiring knowledge of programming or script languages.

A central function of the Designer involves defining the route that a folder takes to fulfill a process. e-Work can accommodate strictly pre-defined routes. However, because it is not always possible to define the route when a procedure is built, e-Work offers "ad-hoc" portions of processes where users decide the next destination of a folder.

Other key elements of the Designer include:

Process Map

The map consists of a number of stages where folders sit in an "in-tray" waiting for actions that move them to the next stage. Before folders are moved along, some stages require user input (a user action), while other stages are processed automatically (a timed action, a conditional action, a rendezvous action or a flagged action).

Forms Editor

Forms used in the process are created only once by users and displayed in the Web browser, the Outlook and GroupWise clients or through Microsoft Digital Dashboard, with e-Work handling the rendering of the forms. Alternatively, HTML forms can be designed in an HTML application, or PDF forms can be designed in Adobe Acrobat, imported into e-Work and displayed through a browser or Adobe Acrobat Reader.

Roles Editor

The Roles Editor defines the roles that direct actions to the appropriate people, and controls folder access. Roles are based on data entered into a form, data read from a database or data cached from a directory service. Roles are evaluated by the Engine when required.
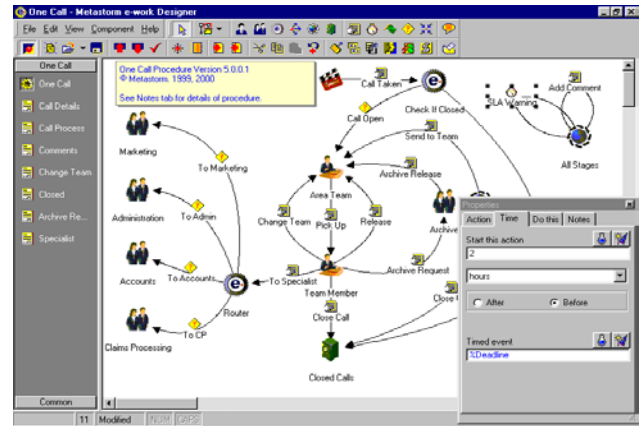
Flags

Flags initiate new folders or release an existing folder from a stage. They are raised by either an e-Work procedure or by some other application, and data can be passed with the flag for use by the procedure.

Engine

e-Work's robust, fault-tolerant Engine manages the folders in the process and the access control to their forms. It ensures that folders are brought to the attention of the right people at the right time with assembly-line-type efficiency, all according to the defined business rules.

Because e-Work uses database architecture, the Engine can draw on all information about the process, including an audit trail, which is automatically logged in the database. This automatic creation of a knowledge base about the execution and content of workflows is a significant benefit, and management reports from this can be generated using any ODBC-compliant reporting tool.

The Engine manages all e-Work transactions and ensures that incomplete actions are not committed to the database. The Engine is also the single point of contact for all external applications and databases that are involved in the process.

Directory Services Integration

e-Work provides a suite of tools to take advantage of information stored in popular directories such as Microsoft Active Directory and Novell Directory Services using LDAP. The use of these tools allows an organization to have a single point of administration for their user information and for the role information required by their processes.

Active Application Integration

e-Work Active Application Integration (AAI) allows developers to extend the functionality of e-Work to build integration to applications including CRM, ERP, Document Management, and Scanning and Imaging over and above that provided by the Integration Wizard. In particular, it can integrate with B2B applications via XML documents using defined interfaces. AAI is achieved in three ways.

Scripting Languages

Developers use a syntax color-coded script editor in the Designer to build scripts to extend Metastorm e-Work 's functionality. The script editor supports either Microsoft Visual Basic® Scripting Edition (VBScript) or Microsoft JScript®. Once a script has been developed the functions defined in it are associated with Metastorm e-Work events using the Formula editor, or the Integration Wizard.

e-Work API

Integration with other applications can be achieved using the e-Work API that allows for exchange of XML messages. Messages can be transformed using XSL style sheets.
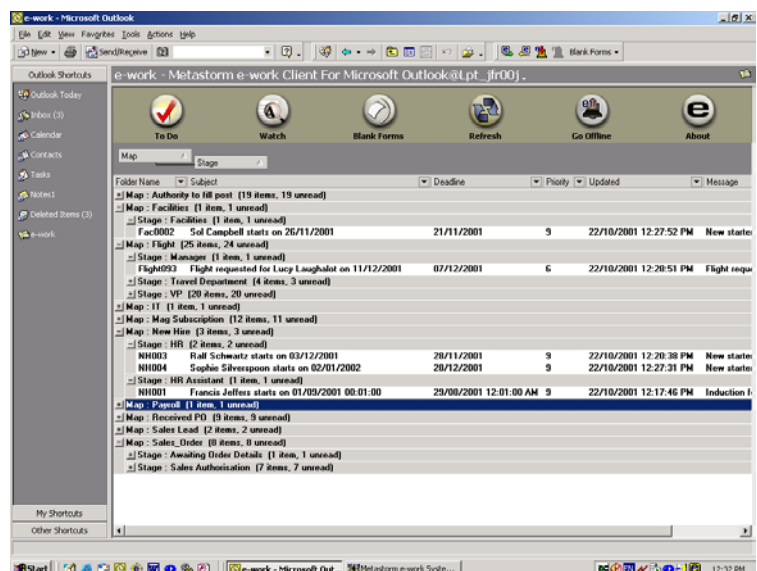
Microsoft Biztalk

The e-Work Accelerator for Microsoft Biztalk provides a rapid method of exchanging data between e-Work and other Biztalk-compliant applications. The Accelerator also provides facilities to manage the details of the partners with whom e-Work communicates.

Client Options

Users can use Microsoft Outlook, Novell GroupWise or a Microsoft Digital Dashboard to fully participate in procedures. This enables participation in the same familiar environment that is used for their everyday tasks. They can initiate new folders into the process, process items on their To Do list, and track folders on their Watch list.

Users of the e-Work extensions for Microsoft Outlook may take their To Do List, Watch List and Blank Forms lists offline and work with them while disconnected from the e-Work Engine; their lists will be automatically synchronized the next time they connect.

Reporting

Any ODBC-compliant report writer such as Microsoft Excel, Microsoft Access or Crystal Reports can generate tabular or graphical reports from e-Work data. Reports are generally of one of three types: Status reports about different processes, reports of data captured by the processes, or workload reports for users.

System Requirements

Designer requires 64 Mbytes RAM under Windows 98, Windows NT, Windows 2000 Professional or Windows XP Professional. 5Mbytes disk required. A mouse is required. An additional 12 Mbytes of free disk space is required if the reference manuals and sample procedures are to be installed. Windows NT, Windows 2000 Professional or Windows XP Professional are recommended.

The Engine requires minimum 256 Mbytes RAM. 5Mbytes disk required. Microsoft Transaction Server required. Microsoft Distributed Transaction Coordinator required. Windows NT4 or Windows 2000 required. Windows XP Professional supported for development and testing.

- e-Work Web server extensions (including PWA) requires minimum 256 Mbytes RAM. 5 Mbytes disk required. Windows NT 4 or Windows 2000 required. Windows XP Professional supported for development and testing. Supports Microsoft IIS Version 4, 5 or 5.1, iPlanet Enterprise server for NT version 4.1.
- Microsoft Internet Explorer Version 5, 5.5 and 6 browsers supported.
- Netscape Communicator Version 4.7 browser supported if external HTML forms are used.
- Processes can be initiated through other browsers if an HTML form using features supported by the browser is used as the creation form.
- Adobe Acrobat 5 Reader required to display Adobe PDF Forms.
- Microsoft Outlook 2000 SR2 or SR3 or Microsoft Outlook 2002 SR1 or SR 2 required for Outlook client.
- Novell GroupWise 6.0.1 required for GroupWise client
- Microsoft SQL Server 7 SP3 or SP4, Microsoft SQL Server 2000 SP2 or SP3, or Oracle 8.1.7 or Oracle 9i R1 or R2 required.
- ODBC and MDAC required for Engine, Designer and Utilities.

Metastorm e-Work Key Components At-a-Glance

User Interfaces

- Available for use "out of the box" via Internet Explorer Web browser
- Microsoft Outlook, Novell GroupWise or a Microsoft Digital Dashboard clients
- To Do and Watch lists available to all clients automatically

High Level Map Designer

- Drag and drop Designer
- Six types of stages:
  - User stage for individuals
  - Group stage where one of a group takes action or where everyone in a group takes action
  - System stage requiring no human intervention
  - Sub-procedure stage that initiates sub-folders in a separate map for parallel processing
  - Common stage whose actions can be applied to one or more other stages
  - Archive at end of a procedure
- Five different types of action:
  - User action
  - Timed action
  - Flagged action triggered by another procedure or external system
  - Conditional action dependent upon data
  - Rendezvous action

Roles

- Roles can be static or dynamically evaluated at runtime
- Roles can be based on data entered into forms, data extracted from databases or information cached from directory services

External Forms

- HTML forms designed in 3rd party forms designers can be placed in e-Work folders.
- Adobe PDF forms designed in Version 5 of Adobe Acrobat can be placed in e-Work folders and be viewed on PCs that have Adobe Acrobat Reader available.

Floating Property Editor

- Edit properties in context
- Lists of available properties presented
- Lists dynamically updated as procedure is designed

Drag and Drop form designer

- Fields, labels, images, grids, buttons, lines and boxes can be placed on forms

- Text, number, date, drop-down, check box, radio group, memo, list box, signature field and clip fields available
- Display of a field can be dependent upon the value in another field
- Control over font and color of fields and labels

Version Control

- Procedure publication password protected
- Copies of each version automatically saved
- Intelligent version updates

Integration Wizard

- Integration for: printing Word 95, 97 and 2000 documents (including field merge), e-mail, ODBC database access, setting the values of variables including priority and deadline, and running scripts and applications
- Access over 100 predefined Metastorm e-Work variables and functions and custom variables defined by the designer

Directory Integration

- Data extract utility to cache data from NDS, LDAP compliant directories (including Microsoft Active Directory) and relational databases

- Data filtering services provided
- Snap-In available for Novell Directory Services, to extend the NDS schema for e-Work role information

Microsoft Biztalk

- Exchange documents with Biztalk Server
- Trading partner Setup procedure

Software Developers Kit

- Script editor supports either Microsoft® Visual Basic® Scripting Edition (VBScript) or Microsoft® JScript®
- XML based helper interface for e-Work Transaction Protocol
- Client component widgets for embedding Metastorm e-Work user services in other clients

Open Reporting

- Report with any ODBC2-compliant application including MS Excel, MS Access and Crystal Reports

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